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ABSTRACT

This report describes the results of a survey designed to provide descriptions of chief business officials (CBOs): their personal characteristics, their career paths, and their preparation. All chief business officials in California K-12 school districts and in offices of county superintendents of schools received questionnaires regarding the CBO position; 662 responses were returned. With regard to personal characteristics, the findings revealed that the CBO in California school districts is a white male, around 45 to 50 years of age, with an expected retirement date of 1998. His yearly salary is about $50,000, and the position he holds is classified rather than certificated. Thirty-seven percent had prior outside experience in business, the military, or civil service. The CBO depended upon personal contacts for advancement. In relation to career paths and preparation, most CBOs had a master's degree. They concurred that budget preparation was the principal skill needed. The CBOs expressed satisfaction with their jobs but were most concerned about the need for a balance between required tasks and allocated resources. Another concern was that the position be advanced in terms of professional understanding and recognition. (JAM)

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The California CBO

The 1987-88 Profile of Chief Business Officials in California Public Schools, Kindergarten Through Grade Twelve

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The 1987-88 Profile of
Chief Business Officials in
California Public Schools,
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Grade Twelve

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PREFACE

The responsibility of local educational agencies (LEAs) for the management of their fiscal resources has drawn the attention of the Governor, Legislature, and members of the public in recent years. Key players in the management of those resources are the chief business officials (CBOs); yet little is known about the people occupying those positions.

To remedy this situation, the California State Department of Education worked cooperatively with Irma Guzmán Wagner of San Jose State University to develop a survey form entitled "The California CBO: The 1987-88 Profile of Chief Business Officials in California K-12 Schools." The survey, which was conducted last year, was designed to provide descriptions of CBOs and their career paths, and it is a first step in understanding more about California's chief business officials.

The information obtained from the survey is truly representative. All persons--regardless of their titles—who were responsible for the total area of school business activity and who supervised subordinate business officers and business office staff were asked to complete the survey. The information they provided was used to develop this document, the first comprehensive report about CBOs in California.

The California CBO: The 1987-88 Profile of Chief Business Officials in California Public Schools, Kindergarten Through Grade Twelve contains important information about persons serving as chief business officials in California schools. For example:

- More than half (53 percent) of the current CBOs in California public schools expect to be retired by the end of 1998.
- Almost twice as many men than women serve as CBOs.
- Only 7.3 percent of California CBOs belong to an ethnic-minority group.

The information contained in this report will be used by the Department, LEAs, and by institutions of higher learning to plan their recruitment and training efforts. We encourage school district and county office administrators and school board members to join with us to ensure that trained men and women are available to carry out the business office functions necessary to California's educational reform efforts.

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Executive Summary

The California CBO: The 1987-88 Profile of Chief Business Officials in California Public Schools, Kindergarten Through Grade Twelve is a comprehensive report regarding the position of the chief business official in the state's public schools. The contents of the document represent the results of a statewide survey designed to answer the question, Who is the California CBO? This executive summary includes highlights from the report and is intended to give the reader an overview of the report that includes complete profiles of typical or representative CBOs according to district size and as a total group.

Survey Description

In December, 1987, all chief business officials in school districts serving kindergarten through grade twelve and in offices of county superintendents of schools received a questionnaire regarding the CBO position. The survey, part of California's educational reform and accountability efforts, was designed to be used in gathering information regarding key business positions in school districts. The instrument had been developed jointly by the California State Department of Education and San Jose State University professor Irma Guzmán Wagner, with input from the Executive Board of the California Association of School Business Officials (CASBO).

By the end of January, 1988, 662 responses had been returned; 630 were from school districts, and 28 were from offices of county superintendents of schools. Four survey forms could not be used because the district size was not identified. Chief business officials in county offices did not represent a sufficient number of CBOs and, therefore, their responses were not included in the report. In some instances respondents did not answer personal questions or questions not applicable to their school districts. Those responding were responsible for the business affairs in districts with 61.3 percent of the public school population in California, kindergarten through grade twelve.

The California CBO survey contained questions regarding CBOs' characteristics, career paths, and preparation. Specific items regarding age, retirement plans, gender, ethnicity, salary and education, titles, credentials/certificates, professional memberships, career planning, recruitment, professional development and training, and experiences in education and outside education were included to help answer the question, How can a CBO be described in terms of personal and professional characteristics? Spaces for comments and recommendations to aspiring CBOs were provided, and excerpts from statements are included in this report along with other findings.

Those responsible for analyzing the data discovered that chief business officials could be described in terms of a representative or typical CBO but that school district size was an important variable to consider in the description. Consequently, the following four categories of CBOs were developed:

1. The small district CBO
2. The medium-sized district CBO
3. The large district CBO
4. The California CBO

While the California CBO report contains comprehensive profiles for each of the categories, the focus of this executive summary is the California CBO. Information about the differences in CBOs based on district size is also included. The reader is encouraged to study the report to obtain a complete picture of California CBOs.

A Profile of the California CBO

The CBO in California school districts (regardless of district size) is a white male, around forty-five to fifty years of age, with an expected retirement date of 1998. His yearly salary is approximately $50,000, and the position he holds is classified rather than certificated. His title is most likely to be that of business manager, assistant superintendent of business services, or superintendent. The CBO is a college graduate, with an average of 18 years of employment by an educational organization; 6.1 of those years have been spent in his current district.

Prior to serving as the district's chief business official, he held various positions in education. Thirty-seven percent of California CBOs have had prior outside experience in business, the military, or civil service.

In general, the CBO did not formally plan his career and depended on personal contacts for advancement. He encourages others to pursue careers as CBOs and advises potential candidates to be skilled in budget preparation, school finance procedures, communication, and decision making.

The California CBO is generally satisfied with his position. However, he is concerned about several issues, including uncertain state financing, increased work requirements, and lack of recognition for the CBO position in the total educational system.

Differences in CBOs

In summary, some distinct differences in CBOs occurred in retirement plans, age, gender, salary distribution, and level of education. CBOs in large districts will be eligible to retire in 1993 and expect to retire in 1996. In contrast, CBOs in smaller districts will be eligible to retire in 1996 but do not expect to do so until 1998. Almost as many women as men occupy CBO positions in small districts; in the medium and large districts, over 90 percent of CBOs are males. CBOs in small districts are paid relatively lower salaries than CBOs in larger districts. In addition, in small districts various titles are used to describe the CBO function. Larger districts pay more, but not considerably more, than medium-sized districts. CBOs in large districts have a minimum of a master's degree as opposed to CBOs in smaller districts, whose educational levels vary from high school diplomas to doctorates. Although CBOs in small districts have more Ed.D.'s and Ph.D.'s than CBOs in large districts, they represent only 6.8 percent of the group. In large districts 23 CBOs or 19.3 percent hold advanced degrees.

In relation to career paths and preparation, more similarities than dissimilarities were found. CBOs, irrespective of district size, developed their careers without formalized planning.

Agreement was found in the degree of importance given to required job skills. All CBO groups concurred that budget preparation was the principal skill needed by aspiring CBOs. The ordering of the top ten skills was fairly consistent, although CBOs in smaller districts ranked accounting/auditing higher than it was ranked by CBOs in medium-sized or large districts. All groups ranked accounting/auditing as one of the top ten skills but not in the same order of priority.

Concerns of CBOs

Regardless of district size CBOs indicated many of the same concerns on the survey form. They expressed satisfaction with their jobs but were most concerned about the need for a balance between required tasks and allocated resources. Another concern expressed by CBOs was that the position be advanced in terms of professional understanding and recognition. The CBO, regardless of district size, wants to be viewed as an integral and contributing member of the educational system.

INTRODUCTION

In 1841 the first acting manager of schools was appointed in Cleveland, Ohio, to:

> *keep a set of books in which he shall open an account for each teacher in the employ of the city, and to make an accurate entry of all moneys paid out, . . . whether for teaching, or rent, or for other purposes, . . . to provide fuel, take charge of the buildings and fixtures, and certify to the council the correctness of all accounts against the city* (Hill, 1982, p. 3).

Since those early days the position of acting manager has been called by different names and has received varying degrees of attention. In California the educational reform movement has focused attention on all areas of schools, including business operations. Recently, the position of the chief business official (CBO) has caught the interest of policymakers because of its importance in the management of the resources needed to support educational reforms. This attention might be equated to the proverbial double-edged sword; it presents both a challenge and an opportunity for school business officials. The challenge lies in responding to new financial accountability requirements, and the opportunity rests in a political climate which is receptive to exploring issues regarding the CBO position.

During the September, 1986, PACE (Policy Analysis for California Education)–Department of Education conference on district business practices, a number of central issues were raised concerning the role of the chief business official or CBO. Questions such as the following were asked: Is there a typical business official? Is there a profile? What do we know regarding the characteristics of these individuals, their preparation, their recruitment, their incentive systems? This document, *The California CBO: The 1987-88 Profile of Chief Business Officials in California Public Schools, Kindergarten Through Grade Twelve*, includes answers to the questions raised by policymakers at the conference.

The California CBO Survey

In December, 1987, the State Department of Education (SDE) mailed to all districts serving kindergarten through grade twelve and offices of county superintendents of schools a survey form entitled "The California CBO: The 1987 Profile of Chief Business Officials in California K-12 Schools." The survey was designed to answer the question, Who is the California CBO? The survey was developed jointly by SDE and the researcher, Irma Guzmán Wagner, Director of Educational Administration, San Jose State University, and contained questions about characteristics, career paths, and preparation of chief business officials. The survey was reviewed by the Executive Board of the California Association of School Business Officials (CASBO). Instructions on the cover of the survey directed the district's chief business official (CBO) to participate. For purposes of the survey, the CBO was defined as follows:

> *Persons who are responsible for and deal with the total area of school business and with subordinate business officers and business staff are designated for the purposes of this study as Chief Business Officials–CBOs. The specific title . . . will vary. . . . In smaller districts, the Superintendent may also be the Chief Business Official.*

By the end of January, 1988, 662 responses had been returned; 630 were from school districts, and 28 were from offices of county superintendents. Four survey forms could not be used because the district size was not identified. Chief business officials in county offices did not represent a sufficient number of CBOs and, therefore, their responses were not included in the

TABLE 1

Responses to the 1987-88 Survey of Chief Business Officials, by Size of District

District size	*Total California school districts by average daily attendance (a.d.a.)*	*Number of responses*	*Percent of responses*
Total group (Small/medium/large combined)	1,028	630	61.3
Small districts (Less than 2,500 a.d.a.)	699	380	54.4
Medium-sized districts (2,500—7,500 a.d.a.)	178	131	73.6
Large districts (Over 7,500 a.d.a.)	151	119	78.8

Note: The 1986-87 *California Basic Educational Data System (CBEDS) Report* and the 1987 *California Public School Directory* were used to determine the number of kindergarten through grade twelve school districts in each category.

report. In some instances respondents did not answer personal questions or questions not applicable to their school districts. Those responding were responsible for the business affairs in districts with 61.3 percent of the public school population, kindergarten through grade twelve (see Table 1). The scope of the California CBO survey was on chief business officials in school districts serving students in kindergarten through grade twelve and did not extend to CBOs in institutions serving students at other levels of instruction.

Organization of the California CBO Report

The information obtained from the California CBO survey has been organized into the following three sections: Characteristics and Concerns of CBOs," "Career Paths and Preparation of CBOs," and "The CBO in Profile." Each section includes a summary of the data pertaining to the (1) small district CBO; (2) the medium-sized district CBO; (3) the large district CBO; and (4) the California CBO as well as pertinent tables and figures. In addition, the first section includes information about the concerns of CBOs; and the second section, information about concerns as well as recommendations by CBOs for improving their profession.

Information about school districts is contained in Appendix A. This information includes data regarding size of districts by a.d.a., type of districts, growth patterns, income, and staffing. Appendix B includes tables on retirement eligibility, expected time of retirement, classification of CBOs, and previous educational experience of CBOs. A job skills list, which was included in the survey, is contained in Appendix C.

Characteristics and Concerns of CBOs

Questions about personal and professional characteristics included in this survey were designed to elicit responses that could be used in developing a profile of the typical CBO. Participants answered specific questions and were given the opportunity to express concerns. The results are presented for (1) personal characteristics; (2) professional characteristics; and (3) concerns of CBOs.

Personal Characteristics

The personal characteristics selected as topics for questions included age, eligibility for retirement, gender, ethnicity, salary, and education. Information about each characteristic follows.

Age of the CBO Population

Age was chosen as a factor to be examined in this survey because of the concern that a large segment of the CBO population might retire before the year 2000. Because of this concern, questions about age as well as retirement were included in the survey. Respondents were presented with ten different categories of age ranges (from under twenty-five to over sixty-five) from which to choose. An examination of the data indicated that:

1. *The small district CBO is* around forty-five years old. In small districts 59.6 percent of CBOs indicated that they were forty-nine years of age or younger; and of that group 38.8 percent were forty to forty-nine years old. This group contained the largest number (20.8 percent) of CBOs who were less than forty years of age.
2. *The medium-sized district CBO* is around forty-five years old. Those who were forty-nine years of age or younger comprised 58.8 percent of the sample. In medium-sized districts 35.8 percent were between fifty and fifty-nine years old, but none was over sixty-five years of age.
3. *The large district CBO* has a good chance of having already reached middle age. In this group 52.9 percent or 63 CBOs had reached the age of fifty. None was younger than thirty; 30 of them were between fifty-five and fifty-nine years of age; nine were between sixty and sixty-four years of age; and one was older than sixty-four.
4. When all CBOs are studied regardless of district size, the characteristic of age shows that *the California CBO* is at or near middle age if that figure is set at fifty. Fifty-seven percent of the total group reported that they were forty-nine years of age or younger. Of the total group 42.8 percent were older than fifty years of age; and none was under twenty-five years of age. The largest proportion (22.3 percent) was in the forty-to-forty-four-year range (see Table 2).

Eligibility for Retirement

Age alone is not the prime factor for determining eligibility for retirement. A number of criteria, including seniority in a particular position, must also be considered. For this reason the following two questions about retirement were included in the survey: When are you eligible to retire? and When do you expect to retire? The responses given by the CBOs are summarized as follows:

1. *The small district CBO* will be eligible to retire in 1996 but expects to retire in 1998. Seventy-four CBOs reported that they would be eligible to retire by the end of 1988.
2. *The medium-sized district CBO* will be eligible to retire in 1995 but does not expect to retire until 1998. The range of years in which medium-sized district CBOs expect to retire is from 1988 to 2021.
3. The large district CBO will be eligible to retire in 1993 but expects to retire in 1996.
4. *The California CBO* will be eligible to retire in 1995 and expects to retire in 1998 (see tables B-1 and B-2, Appendix B).

TABLE 2

Ages of Chief Business Officials, by Size of District

Age range	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
Under 25	0	0	0	0	0	0	0	0
25–29	6	1.6	1	.8	0	0	7	1.1
30–34	21	5.6	7	5.3	4	3.4	32	5.1
35–39	51	13.6	17	13.0	9	7.6	77	12.3
40–44	83	22.2	32	24.4	24	20.2	139	22.3
45–49	62	16.6	20	15.3	19	16.0	101	16.2
50-54	71	19.0	21	16.0	23	19.3	115	18.4
55–59	59	15.8	26	19.8	30	25.2	115	18.4
60–64	18	4.8	7	5.3	9	7.6	34	5.4
Over 65	3	.8	0	0	1	.8	4	.6
Total	374	100.0	131	100.0	119	100.0	624	100.0

Note: Totals in the *number* column indicate the number of responses. Totals in the *percent* column may not add up to 100 percent because of rounding.

Gender of the CBO Population

In 1982 the Association of School Business Officials (ASBO) surveyed its members to determine a number of characteristics, including gender, and found that 92 percent were men (ASBO, 1982). The California CBO survey also included questions about the number of men and women serving as California CBOs. The information about gender pertains to career development, particularly recruitment and training. An examination of the data indicated that:

1. *The small district CBO* could be a female because a close distribution occurred in this size district: 55.5 percent identified themselves as males, and 45.5 percent identified themselves as females.
2. *The medium-sized district CBO* is more likely to be a male because only 21.4 percent or 28 out of a sample of 131 were women.
3. *The large district CBO* is very likely to be male. Of 118 CBOs who responded to the question regarding gender, only 16 were women.
4. Is the California CBO profession male-dominated? On the basis of this particular study, *the California CBO* males outnumber the females by almost two to one. Again, on the basis of this study, 66.2 percent of CBOs in California are men, and 33.8 percent are women (see Table 3).

TABLE 3

Gender of Chief Business Officials, by Size of District

Gender	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
Male	207	55.5	103	78.6	102	86.4	412	66.2
Female	166	44.5	28	21.4	16	13.6	210	33.8
Total	373	100.0	131	100.0	118	100.0	622	100.0

Ethnicity of the CBO Population

The question of ethnicity was included to obtain information about the number of ethnic groups represented in leadership positions in California schools. This question is related to recruitment of future chief business officials. An examination of the data indicated that:

1. *The small district CBO* is unlikely to belong to an ethnic-minority group because 94.8 percent of the CBOs in small districts identified themselves as white.
2. *The medium-sized district CBO* is likely to be white, but more minority group members are found in this size district than in any other; 10.8 percent were other than white. In the medium-sized district, 4.6 percent of the CBOs identified themselves as either Filipino or Hispanic.
3. *The large district CBO* is likely to be white. In this size district 89.8 percent identified themselves as white; 10.2 percent identified themselves as belonging to other ethnic groups.
4. *The California CBO* is likely to be white (see Table 4). A total of 92.7 percent of CBOs in California identified themselves as white.

TABLE 4

Ethnicity of Chief Business Officials, by Size of District

Ethnicity	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
American Indian or Alaskan Native	1	.3	3	2.3	4	3.4	8	1.3
Asian	3	.8	3	2.3	1	.8	7	1.1
Pacific Islander	0	0	1	.8	0	0	1	.2
Filipino	1	.3	3	2.3	1	.8	5	.8
Hispanic	10	2.7	3	2.3	3	2.5	16	2.6
Black	1	.3	0	0	2	1.7	3	.5
White	346	94.8	116	89.2	106	89.8	568	92.7
Other	3	.8	1	.8	1	.8	5	.8
Total	365	100.0	130	100.0	118	100.0	613	100.0

Note: Totals may not add up to 100 percent because of rounding.

Salaries of CBOs Responding to Survey

The salary paid to those occupying key positions in education is usually based on responsibilities and other issues. Questions about salary included in this survey were designed to be used to establish a baseline regarding salaries of CBOs and to identify areas of concern related to compensation. Respondents were asked to identify yearly salary ranges, and their answers indicated that:

1. *The small district CBO* is earning about $40,000 per year. He or she earns less than counterparts in districts of other sizes. In this size district 25.4 percent reported salaries of less than $30,000; and only 28.8 percent were earning more than $50,000 per year.
2. *The medium-sized district CBO* is earning about $60,000 per year. The figures indicate that 99 out of 128 CBOs in this size district were earning between $50,000 and $70,000. Only 19.5 percent were earning less than $50,000.
3. *The large district CBO* usually earns more than $60,000 per year. In this size district 84.7 percent or 100 out of 118 reported that they were receiving salaries of $60,000 or more. Nineteen were earning more than $70,000; three were in the $40,000 to $49,999 range.
4. In answer to the question, What does the California CBO earn? the findings showed that *the California CBO* was earning slightly above $50,000 per year at the time of the survey; 67.9 percent (closely distributed among salary ranges) reported earnings between $40,000 and under $69,999. An unexpected finding was that only 4.2 percent or 26 of the total group were earning more than $70,000 per year. Almost half the respondents reported earnings between $50,000 and $69,999 (see Table 5).

TABLE 5

Yearly Salaries of Chief Business Officials, by Size of District

	Small district CBO		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
Salary range	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
Less than $29,999	95	25.4	0	0.0	0	0.0	95	15.3
$30,000–39,999	73	19.5	5	3.9	0	0.0	78	12.6
$40,000–49,999	98	26.2	20	15.6	3	2.5	121	19.5
$50,000–59,999	82	21.9	51	39.8	15	12.7	18	23.9
$60,000–69,000	23	6.1	48	37.5	81	68.6	152	24.5
Over $70,000	3	.8	4	3.1	19	16.1	26	4.2
Total	374	100.0	131	100.0	119	100.0	624	100.0

Note: Totals may not add up to 100 percent because of rounding.

Educational Background of the CBOs

Education has an impact on the CBO, personally as well as professionally, and this factor needs to be considered in career planning. Questions about education were designed to help identify academic degrees held by CBOs as well as their areas of specialization. An analysis of the answers indicated that:

1. *The small district CBO* is a college graduate with a bachelor's degree and has a fifty-fifty chance of possessing a master's degree. Half the small district CBOs reported to have earned a master's degree. These degrees were primarily in educational administration; fewer than five CBOs reported earning graduate degrees in business-related fields. Although 26 CBOs in this category had earned doctorates, they represent only 6.8 percent of the total group.

2. *The medium-sized district CBO* is likely to have a master's degree. Seventy-eight master's degrees were earned by chief business officials in medium-sized districts. Most respondents indicated that they also held a bachelor's degree (121 out of a sample of 131; two did not respond to this question). Most CBOs earned their master's degrees in educational administration and business administration. Areas of emphasis included economics, finance management, mathematics, public administration, marketing research, school finance, and curriculum.
3. *The large district CBO* is likely to have a master's degree in business or educational administration. Some had master's degrees in business administration. A proportionately higher number of doctorates were found in this size district than in districts of other sizes. Twenty-three or 19.3 percent held an Ed.D. or Ph.D. Only six CBOs reported having a Ph.D. in educational administration, business administration, business-personnel administration, instruction, or law.
4. In response to the question, How educated is the California CBO? the answer is that *the California CBO* is a well-educated high school and college graduate with both undergraduate and graduate degrees. The typical California CBO had both a bachelor's degree and a master's degree. The majority of bachelor's degrees were in business-related fields; few were in education. Master's degrees held were primarily in education and business administration. Fifty-five of the 630 respondents held M.B.A.'s; 67 held Ed.D.'s or Ph.D.'s (see Table 6). Practically all academic areas from agricultural science to zoology were represented.

TABLE 6

Academic Degrees Held by Chief Business Officials, by Size of District

Degree	*Small district CBO* *Number*	*Medium-sized district CBO* *Number*	*Large district CBO* *Number*	*California CBO (total group)* *Number*
N =	380	131	119	630
Doctorate:				
Ph.D.	5	5	6	16
Ed.D.	21	13	17	51
D.P.A.	0	0	0	0
Total	26	18	23	67
Master's:				
M.B.A.	12	20	23	55
M.A.	131	42	30	203
M.Ed.	36	8	14	58
M.S.	16	8	16	40
Total	195	78	83	356
Bachelor's:*				
B.A.	199	68	54	321
B.S.	59	53	46	158
Total	258	121	100	479
Total of all degrees held	479	217	206	902

*These totals may not reflect all B.A. and B.S. degrees held because a few respondents marked only the highest degree held.

N = Size of group and does not represent actual responses.

Professional Characteristics

Questions about the following professional characteristics were included in the survey: titles, credentials and certificates, professional memberships, and experience in school districts and in the community. In addition, space was provided for CBOs to express concerns about the professional aspects of their positions, and their comments are included at the end of this section.

Titles of CBOs Responding to Survey

To answer questions such as, What are the titles given to the CBO position? and How much do those titles vary? CBOs listed their actual titles. Over 60 different titles were given (see Table 7).

An examination of the information relating to titles showed that:

1. *The small district CBO* is most likely to be a business manager, superintendent, or superintendent/principal. Following those job classifications, the title assigned to the person in

TABLE 7

Most Commonly Held Titles of Chief Business Officials, by Size of District

Small district CBO	*Medium-sized district CBO*	*Large district CBO*	*California CBO (total group)*
Title (and number)	*Title (and number)*	*Title (and number)*	*Title (and number)*
Business Manager (91)	Assistant Superintendent, Business Services (33)	Assistant Superintendent, Business Services (42)	Business Manager (139)
Superintendent (77)	Business Manager (31)	Business Manager (17)	Assistant Superintendent, Business Services (82)
Superintendent/ Principal (73)	Assistant Superintendent, Business (22)	Assistant Superintendent, Business (15)	Superintendent (80)
Director, Business Services (8)	Deputy Superintendent (7)	Director, Fiscal Services (6)	Superintendent/ Principal (73)
Assistant Superintendent, Business (7)	Assistant Superintendent (4)	Assistant Superintendent (5)	Assistant Superintendent, Business (44)
Assistant Superintendent, Business Services (7)	Director, Business Services (3)	Deputy Superintendent (4)	Director, Business Services (15)
Director, Fiscal Services (7)	Administrator, Business Services (3)	Other (27)	Assistant Superintendent (15)
Assistant Superintendent (6)	Director, Budget/Fiscal Services (2)		Director, Fiscal Services (14)
Principal/Teacher (5)	Superintendent (2)		Other (157)
Accountant (5	Other (20)		
Bookkeeper (5)			
Finance or Fiscal Director (4)			
Chief Fiscal Officer (4)			
Principal (3)			
Controller (3)			
Business Assistant (3)			
Superintendent, Principal/ Teacher (3)			
Assistant Superintendent, Business/Special Projects (2)			
Other (63)			
N=376	*N*=127	*N*=116	*N*=619

Note: For CBOs identified by district size, "other" includes titles which were used only once. For the California CBO "other" includes titles used eight or fewer times.

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charge of business functions varies. Under "other," where singular titles were listed, different classifications of bookkeepers or secretaries reported that they were the responsible agents.

2. *The medium-sized district CBO* will be either an assistant superintendent of business services or a business manager. The next most popular title is that of assistant superintendent of business.
3. *The large district CBO* is usually identified as the assistant superintendent of business services.
4. *The California CBO* is most likely to be a business manager, assistant superintendent of business services, or superintendent, in that order.

Credentials and Certificates of CBOs

In addition to identifying the title used to describe their position, the respondents identified the position as either certificated or classified. Certificated was defined as "credential required" and classified as "credential not required." Information regarding the types of credentials or certificates held was also requested. The question about certificated and classified positions was included in the survey to obtain information about the number of school districts in which CBOs are required to hold a California administrative credential. An examination of the data for certificated or classified positions indicated that:

1. *The small district CBO* is more likely to be a classified rather than a certificated employee, but the difference is slight—46.6 percent were in certificated positions; and 53.4 percent, in classified positions.
2. *The medium-sized district CBO* is likely to hold a classified position—20.3 percent occupy certificated positions, and 79.7 percent occupy classified positions.
3. *The large district CBO* is likely to hold a classified position. In this size district 83.8 percent reported that they were in classified positions; 16.2 percent said that they were in certificated positions.
4. *The California CBO* has a two-out-of-three chance of holding a classified rather than a certificated position. A total of 35.4 percent of California CBOs were in certificated positions; and 64.6 percent, in classified positions (see Table B-3, Appendix B).

An examination of the data for the types of credentials or certificates held showed that:

1. *The small district CBO* is divided into two almost even groups of those who hold teaching and administrative credentials and those who do not. In this size district 10.2 percent had attended the ACSA/CASBO Business Managers' Academy (see Table 8).
2. *The medium-sized district CBO* is just as likely to have a teaching credential as not. However, only one-third claimed to hold an administrative credential. In this size district 16.8 percent had earned the ACSA/CASBO Business Managers' Academy Certificate, and 13 percent had a university school business manager's certificate.
3. *The large district CBO* is less likely to have a teaching and administrative credential than CBOs in other sized districts; although 43.7 percent reported that they held a teaching credential, and 34.5 percent reported that they held an administrative credential. University school business management certificates were claimed by 11.9 percent, and another 10.9 percent reported that they held certificates from the ACSA/CASBO Business Managers' Academy.
4. *The California CBO* is evenly divided as a group in terms of having a teaching credential, and 42.2 percent held an administrative credential. The next certificate most commonly held was earned through ACSA/CASBO training.

TABLE 8

Credentials and Certificates Held by Chief Business Officials, by Size of District

Credentials/Certificates	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
California Teaching Credential, K–12	199	53.6	60	45.8	52	43.7	311	50.1
Supervisory or Administrative Credential	178	47.7	44	33.6	41	34.5	263	42.2
Community College Supervisory Credential	8	2.1	8	6.1	4	3.4	20	3.2
ACSA/CASBO Business Managers' Academy Certificate	38	10.2	22	16.8	13	10.9	73	11.7
ACSA Leadership Certificate	22	5.9	8	6.1	8	6.7	38	6.1
University School Business Management Certificate	14	3.8	17	13.0	14	11.9	45	7.2
Certified Public Accountant	5	1.3	4	3.1	7	5.9	16	2.6
Other	30	8.0	15	11.5	10	8.4	55	8.8

Note: Numbers represent yes responses to credentials or certificates held by CBOs. Other credentials or certificates specified included business certificates from private colleges, certificates for graduate work, community college teaching credentials, and Associate in Arts degrees.

Professional Memberships of CBOs in California

The question about professional memberships was designed to help determine the involvement of CBOs in professional organizations. Participants indicated whether they were members of ASBO International (Association of School Business Officials International); CASBO (California Association of School Business Officials); AASA (American Association of School Administrators); ACSA (Association of California School Administrators); or CSCPA (California Society of Certified Public Accountants). Data on memberships for CBOs by size of district and as a composite group are presented in Table 9.

TABLE 9

Membership of Chief Business Officials in Professional Organizations, by Size of District

Professional organizations	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
ASBO International	11	3.0	20	15.7	43	36.4	74	12.1
CASBO	181	48.9	117	91.4	105	89.0	403	65.4
AASA	35	9.5	5	4.2	1	.9	41	6.9
ACSA	180	48.8	59	46.5	48	40.7	287	46.7
CSCPA	1	.3	3	2.4	1	.8	5	.8
Other	14	3.8	12	9.4	3	2.5	29	4.7

Note: Numbers represent yes responses to the question of membership.

An examination of the data for memberships in professional organizations indicated that:

1. *The small district CBO* is most likely to belong to CASBO and ACSA than to any other organization, but fewer than half claimed to be members.
2. *The medium-sized district CBO* claims membership in CASBO. Most (91.4 percent) reported that they belong to this organization.
3. *The large district CBO* is a CASBO member. Eighty-nine percent of the total group responded affirmatively to this question. In this size district 36.4 percent of CBOs also belong to the international organization of school business officials.
4. *The California CBO* is most likely to belong to CASBO and is least likely to belong to the California Society of Certified Public Accountants. This finding is not surprising given the small number who claimed to possess CPA certificates.

Experience in Education of CBOs

Included in the survey were questions regarding the length and types of experience in education and outside the field. The results are presented in narrative as well as graphic form (see Figure 1).

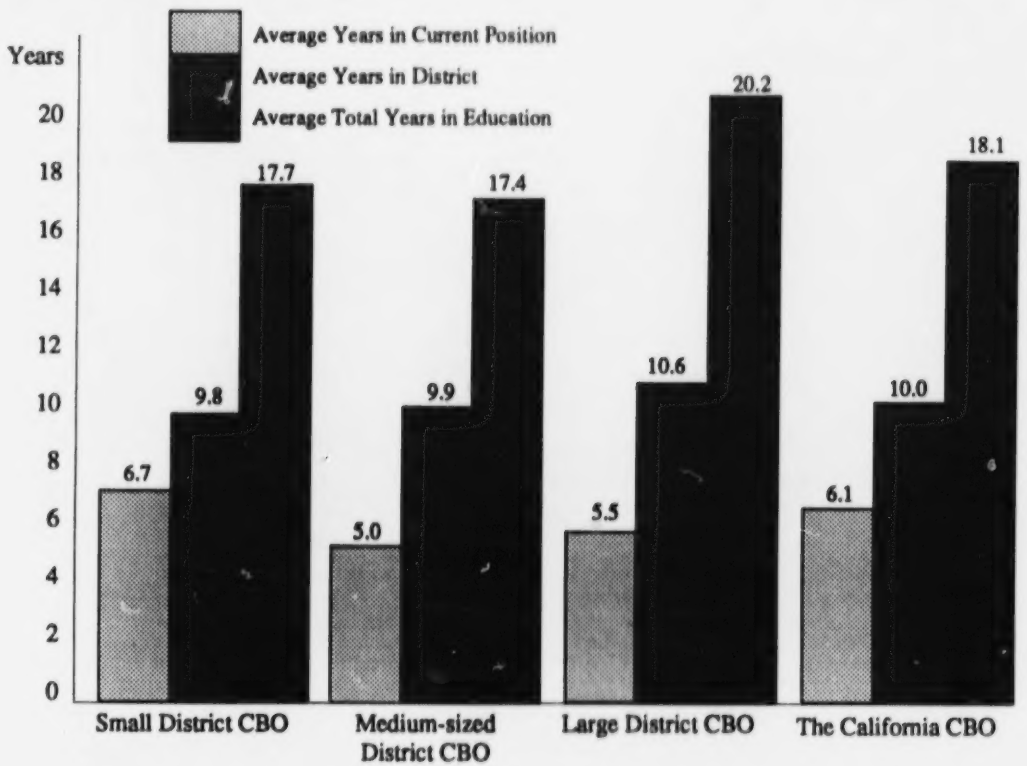


Fig. 1. Average number of years of educational experience of chief business officials

An examination of the responses regarding educational experience indicated that:

1. *The small district CBO* has been in his or her position an average of 6.7 years and has served in education for 17.7 years. Before entering the position, this CBO was likely to have been a teacher and may have had site-level rather than district-level experience. Only a small percent claimed educational experience in community colleges, universities, or private education.
2. *The medium-sized district CBO* has been employed by the same district for 9.9 years. On the average this person has occupied the same position for five years. In this category 45.3 percent of the CBOs reported that they had teaching experience; and 56.3 percent indicated that they had served at the district level, primarily in business service positions. In this group 7.8 percent said that they had some administrative experience in community colleges.
3. *The large district CBO* has been in education for 20.2 years and in the position for five-and-one-half years. Of this sample 72.6 percent had previous district-level experience. Site-level experience did not predominate. Of those who had previous district-level experience, 89.4 percent indicated their area of employment as business services. In this group 7.8 percent claimed experience in four-year institutions of higher education.
4. *The California CBO* has served an average of 18.1 years in education, has been employed by his or her district for ten years, and has occupied his or her position for six years. The business administrator was likely to have been a teacher at one time—51.6 percent of the population indicated prior classroom experience. If the California CBO had district-level experience, it was in the areas of business services (78.8 percent) and personnel (27.5 percent) (see tables B-4 and B-5, Appendix B).

Experience of CBOs Outside Education

The position of chief business official in a school district is often viewed as the position least related to instruction and the one most likely to attract applicants from outside education. The survey contained questions designed to determine whether persons with experience in private industry, the military, or civil service were interested in becoming CBOs. Results indicated that:

1. *The small district CBO* is in the minority if he or she has administrative experience outside education. Experience in private industry was claimed by only 62 of the respondents.
2. *The medium-sized district CBO* outnumbers colleagues with experience in private industry by about four to one because only 37 in the group indicated prior experience in this area. Military experience was claimed by 21 members of medium-sized districts.
3. *The large district CBO* is more likely than not to have had prior experience in private industry—48 persons responded affirmatively to this question. In this size district 14 had from one to 30 years of military experience.
4. *The California CBO's* background is primarily public-school oriented in terms of administrative experience. Of 630 respondents 236 claimed experience in private industry, the military, or civil service (see Table 10).

TABLE 10

Previous Administrative Experience of Chief Business Officials, by Size of District

Type of experience	*Small district CBO*			*Medium-sized district CBO*			*Large district CBO*			*The California CBO (total group)*		
	Number	*Range*	*Average years*	*Number*	*Range*	*Average years*	*Number*	*Range*	*Average years*	*Number*	*Range*	*Average years*
Private Industry	62	1–35	8.5	37	1–25	5.8	48	1–20	6.1	147	1–35	7.1
Military	22	2–27	9.5	21	2–31	9.5	14	1–30	6.3	57	1–31	8.5
Civil Service	16	1–32	8.8	10	1–10	6.0	6	2–10	5.8	32	1–32	7.4

Note: Number = Number of respondents indicating experience in the particular area.
Range = Distribution of years of experience from least to most.
Average years = The mean or average number of years of experience for respondents.

Concerns of CBOs

The survey included space for CBOs to indicate their areas of concern, and many respondents used the space to write comments. Comments regarding personal and professional characteristics were analyzed, and some are included in this section. The nature of the comments indicated that CBOs felt a need for others to view them as contributing members of the educational system. A critical concern was that the chief business official might not be receiving recognition commensurate with the position. One person wrote:

Responsibilities of the CBO are usually twice to three times any other management position, but they are typically the lowest paid in top management.

CBOs reported that the need for academic degrees were essential for aspiring CBOs. For example, one CBO said, "Future CBOs will need formal education and specialized training. . . ."

Another CBO reported, "I came up through the ranks. I wish I had that piece of paper . . . every young CBO will need it." The CBOs saw an academic degree not only as a job requirement but also as a personal aspiration.

CBOs cited a number of personality characteristics as essential for the position. One CBO's personal prescription for success was that:

The CBO must maintain a sense of humor (no matter how warped) and must have great survival instincts, must be honest and fair (he will be accused of being neither), and must be flexible. Must also maintain a high level of enthusiasm and must never say, "It's just not any fun anymore."

In their comments many CBOs addressed the issue of educators versus noneducators in the CBO profession. They expressed diverse and often conflicting thoughts, as demonstrated in the following statements:

You have encouraged school administrators to move into school business (past trend). Most of the individuals I have met over the years had had little or no exposure to any other business environment. I believe this is a major weakness in the school finance field.

The move away from certificated personnel as CBOs is very positive. Finance requires a certain type of person who is very different from an educator. Schools are a business and the finances must be handled by "business" people.

You must remember this is a management [job], not a "business job."

It is very important for the CBO to have been a classroom teacher or school site administrator and to have district-level administrative experience. . . . Too many CBOs do not understand how classrooms . . . work.

All CBOs agreed that the CBO must be a generalist; a blend of education and training is necessary.

Career Paths and Preparation of CBOs

A profile of the chief business official would be incomplete or even skeletal if only personal and professional characteristics were considered. Consequently, questions relating to the careers and preparation of CBOs were included for the survey, and information obtained from the responses were used to complete the profile of the California CBO. Included for analysis and discussion in this section is information based on responses to questions about career planning, recruitment, professional development, and training. Respondents also made recommendations to aspiring CBOs and expressed concerns regarding their positions. Selected comments about their concerns as well as their recommendations are also included in this section.

Career Planning and Recruitment

Does a chief business official formally plan his or her career, or does the career evolve through "planned fate"? The survey included the following question, which was designed to elicit information about career planning: Did you follow a specific long-range career plan? The answers were, for the most part, negative. For example:

1. *The small district CBO* did not plan for a career as a CBO. In this group 77.3 percent or 280 of 362 respondents replied no to the question.
2. *The medium-sized district CBO* did not plan for a career as a CBO. Only 37 percent were involved in formalized planning.
3. *The large district CBO* did little formalized planning. The percentages for the group were 60.5 percent negative responses and 39.5 percent positive responses.
4. *The California CBO* attained his or her position without formalized planning. Only 29 percent of the total group said that they had followed specific long-range career plans.

Those responsible for the development of the survey determined that the persons most knowledgeable about recruitment of CBOs were the CBOs themselves. Consequently, the survey included questions designed to identify the resources CBOs used to learn about their positions as well as those they would recommend to others. Respondents were required to choose from the following resources: professional publications, networking, CASBO membership, ACSA membership, inside track information, job search advisement, university placement advisement, district personnel information, and other. The following resources were identified by CBOs as most helpful and the ones they would recommend to others (listed in order of priority):

1. *The small district CBO* claims that inside track information was the most beneficial means of learning about his or her own position and recommended the following three resources as those most helpful to others:
   - CASBO membership
   - Networking
   - ACSA membership and inside track information (tied)
2. *The medium-sized district CBO* learned about the position through CASBO. The resources recommended to others were:
   - CASBO membership
   - Networking
   - Inside track information

3. *The large district CBO* also claimed that inside track information was the most beneficial mean of learning about his position. Recommendations to others were to use:
   - CASBO membership
   - Networking
   - Inside track information
4. *The California CBO* found out about his or her position through inside track information. Aspiring CBOs were advised to use CASBO membership, networking, and inside track information in their job search. In addition, many respondents commented (under "other") that hard work and perseverance were the best resources a job candidate could possess.

Professional Development and Training

Several questions designed to elicit information about the methods used to help present and potential CBOs in their careers were included in the survey. The first question concerned the degree of importance CBOs placed on mentoring, networking, role models, and environmental/organizational support. Respondents rated those items on a five-point scale as follows: 1 = extremely important; 2 = very important; 3 = important; 4 = not too important; and 5 = not at all important. The results indicated that:

1. *The small district CBO* ranked environmental/organizational support highest (between very important and important). The ratings made by CBOs did not vary significantly. All items received an average rating of 2.5. CBOs marked "other" a number of times and commented that initiative and one's own efforts were critical factors in career development. They also cited experience on the job as an important consideration for advancement.
2. *The medium-sized district CBO* placed mentoring, networking, role models, and environmental/organizational support between very important and important.
3. *The large district CBO* does not see any resource as less than important. The most favored resource was mentoring; the least favored but still important was role models.
4. *The California CBO* views mentoring, networking, role models, and environmental/organizational support as important but not extremely so. The California CBO rated "other—one's own self" (or a variation) highest.

A list of professional development activities was included in the survey, and respondents used this list to rank the activities they felt were important for CBOs preparing for a high-ranking administrative position. The activities included district administrative in-service training; B.A. degree program; master's degree program; doctoral degree program; business degree; certified public accountant program; Business Managers' Academy training; professional conferences; administrative credential program; and other (see Table 11). A summary of the information provided by CBOs follows:

1. *The small district CBO* rated district administrative in-service training as a very important activity for aspiring CBOs. The least important activity was participation in a doctoral program.
2. *The medium-sized district CBO* ranked participation in a B.A. degree program higher than participation in other activities.
3. *The large district CBO* ranked participation in a B.A. degree program the most important and participation in the CPA and administrative credential programs the least important.
4. *The California CBO* views district administrative in-service training and professional conferences as important staff development activities for aspiring CBOs. Fifty respondents

marked "other." Specific activities indicated by CBOs in the "other" category included on-the-job training, which was viewed as a necessity for future CBOs; many respondents signified that this activity was extremely important.

TABLE 11

Recommended Professional Development Activities for Aspiring Chief Business Officials, by Size of District

Professional development activity	*Small district CBO*	*Medium-sized district CBO*	*Large district CBO*	*California CBO (total group)*
	Average score	*Average score*	*Average score*	*Average score*
District Administrative In-service Training	2.0	2.5	2.3	2.2
B. A. Degree Program	2.6	2.0	1.8	2.3
Master's Degree Program	3.2	2.7	2.4	2.9
Doctoral Degree Program	3.9	4.0	3.7	3.9
Business Degree	2.7	2.4	2.3	2.5
CPA Program	3.5	3.8	3.7	3.6
Business Managers' Academy Training	2.5	2.7	2.7	2.6
Professional Conferences	2.2	2.3	2.2	2.2
Administrative Credential Program	3.2	3.9	3.7	3.4

Note: Questionnaire Scale: 1=Extremely Important; 2=Very Important; 3=Important; 4=Not Too Important; 5=Not At All Important

The Arthur Young study entitled "Fiscal Management Training Needs of California Local Education Agencies," which was prepared for the California State Department of Education, included a list of training requirements for chief business officials and other levels of school business employees (Arthur Young, 1986). Some items were selected from this study to be included in the CBO survey. In addition, other training variables taken from management and leadership research were included in a job skills list (see Appendix C, "Job Skills List").

Of the 34 job skills included in the job skills list, respondents identified (in order of priority) the ten most important for a CBO job applicant to possess. Every job skill was given a ranking, although warehousing was identified as having some degree of importance by only two respondents. Ten job skills were given the highest rankings by most respondents (see Table 12).

The California CBO considered budget preparation, knowledge of school finance, and communication skills to be the three most important job skills required of a CBO job applicant. Skills in the areas of decision making, finance, leadership, accounting/auditing, human relations, critical thinking, and school business law were also identified as important. Technical skills such as data processing, purchasing supplies, and warehousing received lower rankings. CBOs commented that all skills were important, and a small number of respondents may have not ordered their preferences for that reason.

Concerns and Recommendations of CBOs

One section of the survey included space for CBOs to express their concerns about their careers and recommendations to others interested in a career as a CBO. Some CBOs cautioned not to overemphasize training at the expense of on-the-job experience and recommended that internships in school business administration be offered. CBOs expressed different opinions about the question of educators versus noneducators in CBO positions. However, CBOs agreed

TABLE 12

Requisite Job Skills for Chief Business Officials in Rank Order, by Size of District

Rank	*Small district CBO*	*Medium-sized district CBO*	*Large district CBO*
1.	Budget Preparation	Budget Preparation	Budget Preparation
2.	School Finance Knowledge	School Finance Knowledge	Decision Making
3.	Communication Skills	Communication Skills	Communication Skills
4.	Decision Making	Decision Making	School Finance
5.	Accounting/Auditing	Leadership Techniques	Leadership Techniques
6.	Financial Issues Knowledge	Financial Issues Knowledge	Critical Thinking
7.	Human Relations	Human Relations	Human Relations
8.	Leadership Techniques	Critical Thinking	Financial Issues Knowledge
9.	Critical Thinking	School Business Law	School Business Law
10.	Personnel Management	Accounting/Auditing	Accounting/Auditing

that a balance between the business and educational orientation of the position is necessary. CBOs indicated that additional training in business finance was necessary because of new financial requirements.

CBOs recommended intern programs as a method of recruiting and training prospective CBOs. They also suggested that recruitment activities be conducted outside the educational system.

According to CBOs, stress, additional legal requirements, and winning the lottery might accelerate their leaving the position. However, they identified job satisfaction, the opportunity to make substantive decisions, and the challenge of contributing to the financial stability of a school district as factors that maintain and sustain California chief business officials in their positions.

The survey also included space for participants to indicate (for potential candidates) the most rewarding and the least rewarding aspects of their jobs and whether they would encourage persons starting out in school administration to pursue careers leading to a top school business administration position.

Information provided by respondents concerning the most rewarding aspects of their jobs indicated that:

1. *The small district CBO* views himself or herself as a critical element in supporting the educational environment of the school. The small district CBO cited working with people as a major reward. Students and their programs were cited repeatedly as positive reinforcers. Small district CBOs also noted satisfaction in accomplishing tasks, particularly those related to budget development. Meeting financial challenges and making decisions on a regular basis were viewed by many as the spice of life of the small district CBO. Repondents also viewed participation in education in a supportive capacity as a major reward.
2. *The medium-sized district CBO* finds major rewards in running a fiscally sound district that benefits students. To the medium-sized district CBO, pluses of the job included the people; the intellectual challenges; and the opportunity to bring about change, make things happen, and resolve complex issues. The opportunity to have a total view of district operations was noted as a benefit. Only one respondent noted that rewards no longer existed.
3. *The large district CBO* finds rewards in the multifaceted nature of the job and in the variety of responsibilities. The ability to influence students, the staff, and the community was cited as benefit. Managing a financially sound district in the best interests of the educational program was reported to be a major reward.

4. *The California CBO* cites many different rewards of the position to a prospective CBO, including diversity, opportunities to affect children and their instructional programs, and the opportunity to attain job satisfaction through sound fiscal management and organization.

Information provided by respondents concerning the least rewarding aspects of their jobs indicated that:

1. *The small district CBO* notes frustration in dealing with a complex bureaucracy that neccesitates completing seemingly endless paperwork. Uncertainty and insufficiency of resources to provide adequately for educational needs were cited as recurring concerns. An unrewarding aspect of the job was educators' lack of understanding about the business official's job. The small district CBO also described the position as one requiring time beyond the limits of a normal working day.
2. *The medium-sized district CBO* believes that the job could be improved with less paperwork and unnecessary bureaucratic requirements. The uncertainty of the financial environment, lack of adequate resources, and increased work loads were described as the least rewarding aspects of the job.
3. *The large district CBO* expressed a number of concerns about the politics of groups and individuals with whom he or she interacts. Specific groups and individuals mentioned included the state, the school board, the superintendent, unions, and the public. Tight budgets and uncertain financing were cited as unrewarding to a business administrator. A recurring theme was that the position would be more rewarding if others recognized the professionalism of the persons serving as CBOs.
4. *The California CBO* is least rewarded by a financing system that is uncertain and demanding. Continuously increasing requirements result in decreased time and help to make the position difficult. Recognition of their contributions within the educational system was called for by CBOs.

Would current CBOs encourage others to follow them? The answer was affirmative.

1. *The small district CBO* is willing to encourage others, as shown by a 91.1 percent response rate.
2. *The medium-sized district CBO* will encourage others. Only a small minority in this size district (15.9 percent) responded that they would not be encouraging.
3. *The large district CBO* would provide encouragement. Ninety-four percent indicated that they would do so.
4. *The California CBO*, nine times out of ten, will encourage future CBOs.

The CBO in Profile

Profiles or sketches serve as reference points between what exists and what is needed and are useful tools for decision makers. However, profiles focus on the average or typical description of a particular group, and variability from the norm is also important information for decision making. In this report deviations from group norms were a part of the discussion of the findings but have not been noted in the finalized profiles. Reference can be made to the text and tables to obtain detailed information regarding the extent to which CBO members deviate from the average group.

Information about the most typical CBO characteristics and career factors was included in the sections "Characteristics and Concerns of CBOs" and "Career Paths and Preparation of CBOs." Information contained in those sections is summarized in this section and used as the basis of the CBO profiles. From the data analysis it was apparent that chief business officials could be described in terms of a representative or typical CBO but that sufficient variation existed to warrant the development of separate profiles on the basis of district size. As a result, profiles were developed for the average or typical small, medium-sized, and large district CBO and for the California CBO.

The Small District CBO

The small district CBO is around forty-five years of age. He or she will be eligible to retire in 1996 but does not expect to do so until 1998. He or she is a white administrator earning about $40,000 per year and has a bachelor's degree and possibly a master's degree. This person is either a classified business manager or a superintendent or a superintendent/principal. About half the CBOs hold both teaching and administrative credentials and are more likely to belong to CASBO and ACSA than to any other professional organization. He or she has been in education for over 17 years and has almost seven years of experience in the current position. It is unlikely that this person would have managerial experience outside education.

The small district CBO did not plan his or her career, learned about the position through inside track information, and advanced in the position through help received from work-related and professional organizations. The small district CBO recommends that CBO candidates participate in district administrative in-service training, be knowledgeable about budget preparation and school finance, and have communication skills. The small district CBO would encourage others seeking similar positions and would tell them that working with people is a major reward of the job, although he or she finds dealing with bureaucratic paperwork frustrating.

The Medium-sized District CBO

The medium-sized district CBO is a white male around forty-five years of age. He expects to retire in 1998 but will be eligible to retire in 1995. He earns around $60,000 per year and has a master's degree. That degree is more likely to be in educational administration than in business. His title is either assistant superintendent of business services or business manager, and his position is a classified one. He is less likely to hold an administrative credential than a teaching certificate. He is a member of CASBO and advocates membership to CBO candidates. His experience in the district totals ten years, and half of that time has been spent in his current position. Prior to his current assignment, he likely served in a district-level business services position. Because only a few of his peers are former managers in the military or private industry, it is unlikely that he has experience outside education.

He did not plan for his career and learned about the job through membership in CASBO. He considers mentoring to be an important resource for career advancement. He believes that a bachelor's degree for an aspiring CBO is critical and that knowledge and skills should be developed in budget preparation, school finance, and communication. He encourages CBO candidates to pursue a top position in school business administration but cautions them about the work load and frustrations caused by an uncertain state financing system. He describes the ability to establish a fiscally sound school district that benefits students as a positive factor of the job.

The Large District CBO

The large district CBO is a white male around fifty years of age. He will be eligible to retire in 1993 but does not expect to do so until 1996. He earns $60,000 per year or more and has a master's degree. His degree is likely to be in business administration or educational administration. His title is usually assistant superintendent of business services, and his position does not require a credential. He holds different credentials and certificates, but no particular pattern was noted. His service in the district totals ten years; he has spent six years in his current position. It is likely that this CBO had previous experience in private industry, the military, or civil service.

He did not formally plan his career and learned about his job through inside track information. While he does not discount this method to others, he first recommends membership in CASBO. He favors mentoring as a resource to help others advance in their careers and views a bachelor's degree program as important for prospective CBOs seeking top-level positions. He does not view CPA and administrative degree programs as important for CBOs. He encourages others to become CBOs and recommends that they develop knowledge of and skills in budget preparation, decision making, and communication. He believes that the rewards of the job rest in diversity and challenge and are diminished through excessive political pressure and unrealistic demands.

The California CBO

When all CBOs, regardless of district size, are considered, the typical California CBO may be characterized as a white male around forty-five to fifty years of age. He expects to retire in 1998 (53 percent indicated they expect to retire by the end of 1998) but will be eligible to retire in 1995. He earns slightly above $50,000 a year and is a college graduate holding a classified position as a business manager, assistant superintendent of business services, or superintendent. Although a teaching credential is not a requirement for the position, there is a 50 percent chance that the California CBO has one. He is a member of CASBO but not of other professional business organizations. That is not surprising because his background is primarily public school oriented. He did not formally plan his career and learned about his position through inside track information. He would encourage others to seek a CBO position but is concerned about a number of important issues, including uncertain state financing, increased work requirements, and lack of recognition for the profession by nonbusiness members of the school system. The California CBO is rewarded through job satisfaction, not monetary incentives.

In the survey the California CBO expressed a desire that positive attention be given to the position:

> *I see the CBO as an integral part of the whole education operation. . . .*
>
> *I would hope that this survey may bring some of my concerns out in the open; and perhaps someday soon, the CBO can be looked upon as an important, productive member of the school leadership community.*

Appendix A
District Information

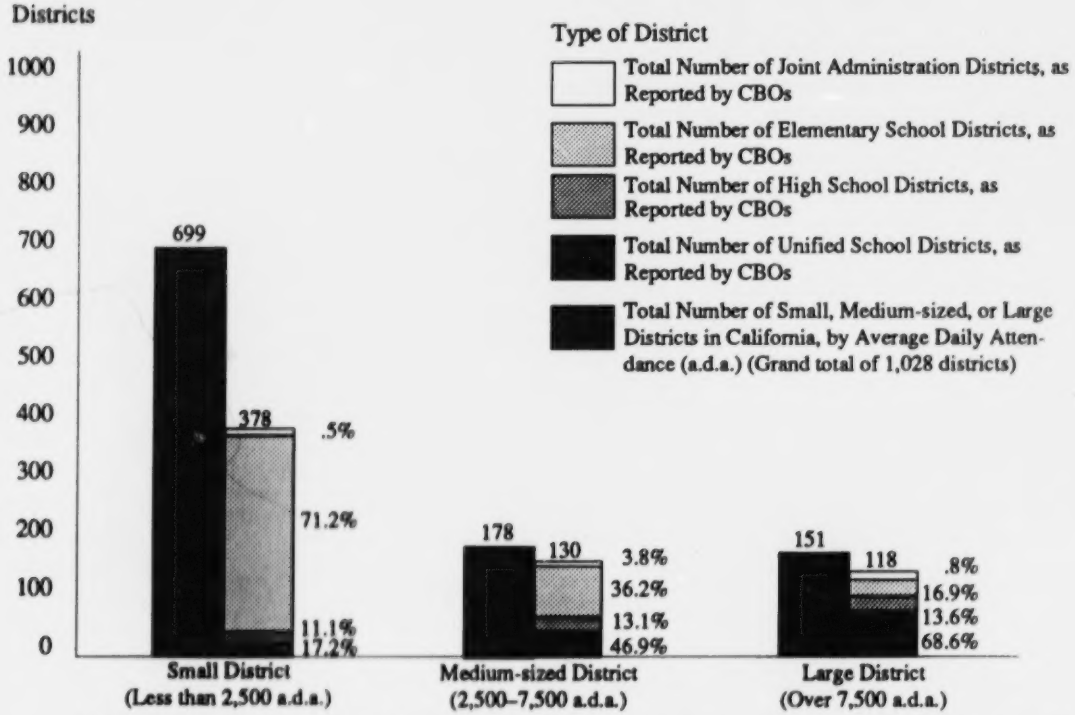
Items regarding district size, type, growth patterns, income, and staffing were included in the survey to obtain information about the environment in which chief business officials carry out their responsibilities.

Size of Districts

For purposes of the survey, districts were categorized on the basis of average daily attendance (a.d.a.) as follows: small—less than 2,500 a.d.a.; medium—2,500–7,500 a.d.a.; large—over 7,500 a.d.a. The number of students served by the respondents' districts ranged from five to 65,139. Small districts averaged 710 students; medium-sized districts averaged 4,379 students; and large districts averaged 15,402 students.

Type of Districts

Chief business officials described their districts as unified, high school, elementary, or joint administration. In the small district category, 71.2 percent were categorized as elementary; 17.2 percent, as unified. In the large district category, 68.6 percent were described as unified; 16.9 percent, as elementary. Less extremes in district-type distribution were found in medium-sized districts (see Figure A-1).



Note: 626 CBOs responded to the question about type of district; four CBOs did not respond to this item.

Fig. A-1. Comparison of chief business officials' districts, by a.d.a. and type of district

Growth Patterns

Data developed by the State Department of Finance and included in the June, 1988, issue of *CASH Register* indicated that enrollment of students in kindergarten through grade twelve will reach 5.2 million by 1993—an increase of an average of 140,000 students each year or 850,000 more students than those enrolled in 1987 [CASH (Coalition for Adequate School Housing), 1988]. Information provided by CBOs substantiated these predictions. According to CBOs, almost two-thirds of California's school districts are growing, with the greatest growth occurring in large districts (see Table A-1).

TABLE A-1

District Growth Patterns, by Size of District

	Small district CBO		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
Growth pattern	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
Growing	211	34.6	89	14.6	87	14.3	387	63.4
Stable	125	20.5	25	4.1	18	3.0	168	27.5
Declining	32	5.2	11	1.8	11	1.8	54	8.9
Other	0		1		0		1	.2

Note: Percentages for small, medium, and large district CBOs are given in relation to the total group of California CBOs. The "other" respondent noted both growth and decline in the district.

Income in Districts Responding to Survey

Respondents indicated the amount of funds received by their districts in 1986-87 from all sources of revenue. The amounts identified by CBOs ranged from $80,908 to $375,628,570. A number of respondents cautioned not to use revenue figures to determine the extent of a chief business official's responsibilities. In small districts CBOs noted that amounts may be smaller but that so is the staff needed to carry out necessary tasks. A number of CBOs in districts with fewer than 2,500 students indicated that their job required them to "wear many hats." Some administrators in smaller districts viewed larger districts as having far more resources to help with management functions. For example, a school district administrator noted, "The business manager must be responsible for clerical areas that in larger staffs would not be handled by a manager."

Another wrote, "My duties are immense being a small school district, yet we do not have a management system such as those of any large scale district."

According to CBOs in large districts, the complexity of tasks was increasing rather than decreasing, and sufficient resources needed to keep up with additional demands were not always available. For example:

> *It should be recognized that the CBO is the chief financial officer and the chief engineering officer of a multimillion dollar business enterprise which is usually the second or largest employer in the area.*

> *I frequently describe my position as a marketing agent . . . for effecting changes. The time and personal commitments are excessive (partly due to lack of staff).*

Staffing in Districts Surveyed

The data relating to staffing indicated that on the average small districts were employing 67 certificated or classified staff members; medium-sized districts, 384 certificated or classified staff members; and large districts, 1,450 certificated or classified staff members. The number of staff members under the supervision of the chief business official ranged from one to 1,296.

Appendix B
SUPPLEMENTARY TABLES

TABLE B-1
Retirement Eligibility for Chief Business Officials, by Year and Size of District

Year eligible to retire	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
1978	1	.3	0		0		1	.2
1981	2	.9	0		3	2.7	5	1.0
1982	3	1.8	1	.8	0		4	1.7
1983	1	2.1	2	2.3	0		3	2.3
1984	2	2.7	2	3.9	2	4.4	6	3.3
1985	5	4.2	3	6.3	6	9.7	14	5.7
1986	3	5.1	4	9.4	4	13.3	11	7.6
1987	11	8.4	7	14.8	5	17.7	23	11.6
1988	46	22.1	13	25.0	18	33.6	77	25.0
1989	10	25.1	3	27.3	7	39.8	20	28.5
1990	19	30.7	6	32.0	6	45.1	31	33.9
1991	12	34.3	6	36.7	3	47.8	21	37.5
1992	17	39.4	6	41.4	2	49.6	25	41.8
1993	9	42.1	5	45.3	3	52.2	17	44.8
1994	10	45.1	3	47.7	3	54.9	16	47.6
1995	6	46.9	6	52.3	3	57.5	15	50.2
1996	12	50.4	2	53.9	9	65.5	23	54.2
1997	14	54.6	7	59.4	5	69.9	26	58.7
1998	13	58.5	4	62.5	5	74.3	22	62.5
1999	13	62.4	4	65.6	2	76.1	19	65.8
2000	15	66.9	9	72.7	6	81.4	30	71.0
2001	8	69.3	5	76.6	4	85.0	17	74.0
2002	19	74.9	7	82.0	3	87.6	29	79.0
2003	11	78.2	2	83.6	1	88.5	14	81.4
2004	8	80.6	2	85.2	2	90.3	12	83.5
2005	11	83.9	1	85.9	4	93.8	16	86.3
2006	10	86.9	0		0		10	88.0
2007	8	89.3	3	88.3	1	94.7	12	90.1
2008	9	91.9	2	89.8	1	95.6	12	92.2
2009	4	93.1	6	94.5	1	96.5	11	94.1
2010	3	94.0	2	96.1	2	98.2	7	95.3
2011	2	94.6	2	97.7	0		4	96.0
2012	2	95.2	0		0		2	96.4
2013	4	96.4	0		0		4	97.0
2014	2	97.0	0		1	99.1	3	97.6
2015	4	98.2	0		0		4	98.3
2016	1	98.5	1	98.4	0		2	98.6
2017	2	99.1	0		0		2	99.0
2018	2	99.7	0		1	100.0	3	99.5
2020	0		1	99.2	0		1	99.7
2026	1	100.0	0		0		1	99.8
2027	0		1	100.0	0		1	100.0
Number of CBOs responding to item	335		128		113		576	
Number of CBOs not responding	45		3		6		54	
Total number of CBOs participating in survey	380		131		119		630	

Note: Percentages are cumulative and based on the actual number of responses. The number of responses in each group is sufficient to constitute a representative sample.

TABLE B-2

Expected Time of Retirement for Chief Business Officials, by Year and Size of District

Year expected to retire	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
1987	1	.3	0		1	1.0	2	.4
1988	5	2.0	6	5.0	7	7.7	18	3.8
1989	16	7.4	5	9.2	5	12.5	26	8.8
1990	23	15.1	7	15.0	13	25.0	43	17.0
1991	14	19.7	5	19.2	5	29.8	24	21.6
1992	18	25.8	7	25.0	4	33.7	29	27.2
1993	11	29.4	6	30.0	7	40.4	24	31.7
1994	8	32.1	4	33.3	4	44.2	16	34.8
1995	21	39.1	6	38.3	5	49.0	32	40.9
1996	9	42.1	5	42.5	6	54.8	20	44.7
1997	12	46.2	5	46.7	4	58.7	21	48.8
1998	16	51.5	4	50.0	2	60.6	22	53.0
1999	8	54.2	4	53.3	2	62.5	14	55.6
2000	17	59.9	9	60.8	6	68.3	32	61.8
2001	6	61.9	4	64.2	7	75.0	17	65.0
2002	19	68.2	6	69.2	3	77.9	28	70.4
2003	5	69.9	2	70.8	1	78.8	8	71.9
2004	8	72.6	2	72.5	3	81.7	13	74.4
2005	10	75.9	6	77.5	5	86.5	21	78.4
2006	13	80.3	2	79.2	1	87.5	16	81.5
2007	6	82.3	4	82.5	2	89.4	12	83.7
2008	12	86.3	1	83.3	2	91.3	15	86.6
2009	9	89.3	3	85.8	2	93.3	14	89.3
2010	5	91.0	6	90.8	2	95.2	13	91.8
2011	3	92.0	2	92.5	1	96.2	6	92.9
2012	3	93.0	3	95.0	2	98.1	8	94.5
2013	3	94.0	0		0		3	95.0
2014	1	94.3	0		1	99.0	2	95.4
2015	5	96.0	1	95.8	1	100.0	7	96.7
2016	2	96.7	1	96.7	0		3	97.3
2017	4	98.0	2	98.3	0		6	98.5
2018	3	99.0	0		0		3	99.0
2019	1	99.3	0		0		1	99.2
2020	0		1	99.2	0		1	99.4
2021	0		1	100.0	0		1	99.6
2024	1	99.7	0		0		1	99.8
2036	1	100.0	0		0		1	100.0
Number of CBOs responding to item	299		120		104		523	
Number of CBOs not responding	81		11		15		107	
Total number of CBOs participating in survey	380		131		119		630	

Note: Percentages are cumulative and based on actual number of responses. The number of respondents in each group is sufficient to constitute a representative sample.

TABLE B-3

Classification of Chief Business Officials, by Size of District

Category	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Number	*Percent*	*Number*	*Percent*	*Number*	*Percent*	*Number*	*Percent*
Certificated	173	46.6	26	20.3	19	16.2	218	35.4
Classified	198	53.4	102	79.7	98	83.8	398	64.6
Total	371	100.0	128	100.0	117	100.0	616	100.0

TABLE B-4

Previous Educational Experience of Chief Business Officials, by Size of District

Area of educational experience	*Small district CBO*	*Medium-sized district CBO*	*Large district CBO*	*California CBO (total group)*
	Percent	*Percent*	*Percent*	*Percent*
Teaching	56.0	45.3	44.8	51.6
Administration, Site-Level	47.3	30.5	27.6	40.1
Administration, District-Level	34.8	56.3	72.6	46.6
Area of District-Level Administrative Experience: The following percentages represent the percent of those who had previous district-level experience.				
Business Services	68.5	84.5	89.4	78.8
Instruction	39.4	14.1	11.8	24.7
Personnel	41.4	14.1	17.6	27.5
Superintendency	36.5	7.0	5.9	19.9
Special Education	12.7	8.5	2.4	8.5
Other	12.6	5.6	1.2	7.4

TABLE B-5

Previous Educational Experience of Chief Business Officials in Other Than Public Schools, by Size of District

Educational organization	*Small district CBO*		*Medium-sized district CBO*		*Large district CBO*		*California CBO (total group)*	
	Average years	*Percent*	*Average years*	*Percent*	*Average years*	*Percent*	*Average years*	*Percent*
Community College	6.5	4.6	5.7	7.8	4.8	3.4	6.0	5.1
Four-Year College or University	6.8	3.0	2.5	3.1	3.6	7.8	5.3	3.9
K–12 Private Education	4.7	2.7	6.3	2.4	5.7	6.0	5.2	3.3

Appendix C

Job Skills List

The following job skills list is taken from the survey "The California CBO: The 1987 Profile of Chief Business Officials in California K-12 Schools" and is presented in its entirety.

PART III: CHIEF BUSINESS OFFICIAL - CBO CAREER PATHS

10. In selecting a CBO, which job skills would be the most critical for an applicant to possess?

DIRECTIONS: Please read each of the job skills listed below. Circle the ten (10) job skills which are the most critical for a CBO to possess. Below the list, there is a section provided for ranking the critical job skills which you have circled.

1	ACCOUNTING AUDITING	18	GRAPHICS/REPRODUCTION
2	ATTENDANCE ACCOUNTING	19	HUMAN RELATIONS
3	BUDGET PREPARATION/MANAGEMENT	20	INSTRUCTION
4	COLLECTIVE BARGAINING	21	INVENTORY MANAGEMENT
5	COMMUNICATION SKILLS	22	INVESTMENT/CASH MGMT.
6	COMMUNITY RELATIONS	23	LEADERSHIP TECHNIQUES
7	COMPUTER APPLICATIONS	24	MGMT. INFORMATION SYSTEMS
8	CONSTRUCTION	25	PERSONNEL MANAGEMENT
9	CRITICAL THINKING	26	PROPERTY MANAGEMENT
10	CUSTODIAL OPERATIONS	27	PURCHASING & SUPPLIES
11	DATA PROCESSING	28	RISK MANAGEMENT
12	DECISION-MAKING	29	SCHOOL BUSINESS LAW
13	ENERGY MANAGEMENT	30	SCHOOL FINANCE
14	EVALUATION OF SUPPORT SERVICES	31	STRATEGIC PLANNING
15	FACILITIES PLANNING/MANAGEMENT	32	TRANSPORTATION
16	FINANCIAL ISSUES KNOWLEDGE	33	WAREHOUSING
17	FOOD SERVICES	34	OTHER (please specify)_____

Take the 10 CRITICAL JOB SKILLS that you circled above and rank them, on the lines provided below, from "1" to "10" with "1" being the most important. *For example, if you believe that No. 27- "Purchasing & Supplies" is the most critical skill for a CBO to possess, you would enter "27" on the line next to "1". Then rank the second most important by placing the corresponding number from the list above on Line 2.* Continue doing the same for the 10 job skills which you circled above.

1.	_____	6.	_____
2.	_____	7.	_____
3.	_____	8.	_____
4.	_____	9.	_____
5.	_____	10.	_____

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Publications Available from the Department of Education

This publication is one of over 650 that are available from the California State Department of Education. Some of the more recent publications or those most widely used are the following:

ISBN	Title (Date of publication)	Price
0-8011-0271-5	Academic Honesty (1986)	$2.50
0-8011-0722-9	Accounting Procedures for Student Organizations (1988)	3.75
0-8011-0272-3	Administration of Maintenance and Operations in California School Districts (1986)	6.75
0-8011-0275-8	California Dropouts: A Status Report (1986)	2.50
0-8011-0687-7	The California CBO: The 1987-88 Profile of Chief Business Officials in California Public Schools, K—12 (1989)	4.50
0-8011-0783-0	The California Private School Directory, 1988-89 (1988)	14.00
0-8011-0748-2	California School Accounting Manual (1988)	8.00
0-8011-0715-6	California Women: Activities Guide, K—12 (1988)	3.50
0-8011-0488-2	Caught in the Middle: Educational Reform for Young Adolescents in California Public Schools (1987)	5.00
0-8011-0760-1	Celebrating the National Reading Initiative (1989)	6.75
0-8011-0749-0	Educational Software Preview Guide, 1988-89 (1988)	2.00
0-8011-0041-0	English-Language Arts Framework for California Public Schools (1987)	3.00
0-8011-0731-8	English-Language Arts Model Curriculum Guide, K—8 (1988)	3.00
0-8011-0710-5	Family Life/Sex Education Guidelines (1987)	4.00
0-8011-0289-8	Handbook for Physical Education (1986)	4.50
0-8011-0249-9	Handbook for Planning an Effective Foreign Language Program (1985)	3.50
0-8011-0320-7	Handbook for Planning an Effective Literature Program (1987)	3.00
0-8011-0179-4	Handbook for Planning an Effective Mathematics Program (1982)	2.00
0-8011-0290-1	Handbook for Planning an Effective Writing Program (1986)	2.50
0-8011-0250-2	Handbook on California Education for Language Minority Parents—Chinese/English Edition (1985)	3.25*
0-8011-0737-7	Here They Come: Ready or Not—Report of the School Readiness Task Force (1988)	2.00
0-8011-0712-1	History-Social Science Framework for California Public Schools (1988)	6.00
0-8011-0782-2	Images: A Workbook for Enhancing Self-esteem and Promoting Career Preparation, Especially for Black Girls (1989)	6.00
0-8011-0208-1	Manual of First-Aid Practices for School Bus Drivers (1983)	1.75
0-8011-0209-X	Martin Luther King, Jr., 1929—1968 (1983)	3.25
0-8011-0358-4	Mathematics Framework for California Public Schools (1985)	3.00
0-8011-0664-8	Mathematics Model Curriculum Guide, K—8 (1987)	2.75
0-8011-0685-0	Microcomputers for Use in School District Administration (1987)	9.00
0-8011-0252-9	Model Curriculum Standards: Grades 9—12 (1985)	5.50
0-8011-0762-8	Moral and Civic Education and Teaching About Religion (1988)	3.25
0-8011-0303-7	A Parent's Handbook on California Education (1986)	3.25
0-8011-0671-0	Practical Ideas for Teaching Writing as a Process (1987)	6.00
0-8011-0311-8	Recommended Readings in Literature, K—8 (1986)	2.25
0-8011-0745-8	Recommended Readings in Literature, K—8, Annotated Edition (1988)	4.50
0-8011-0759-8	Resource Guide: Conferences, Workshops, and Training Opportunities for District and County Business Office Staff, 1988-89 (1988)	4.50
0-8011-0189-1	Science Education for the 1980s (1982)	2.50
0-8011-0354-1	Science Framework Addendum (1984)	3.00
0-8011-0781-4	Selected Financial and Related Data for California Public Schools (1988)	3.00
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